

TA373: Maintaining an Employee's Work Schedule

Maintaining an Employee's Work Schedule Overview

This Job Aid provides step-by-step instructions for assigning employee Work Schedules in Cardinal.

You can run the **Employee Schedule Review** (**RTA717**) query to review employee schedule information. For further information about this query, see the Job Aid titled **HCM Reports Catalog**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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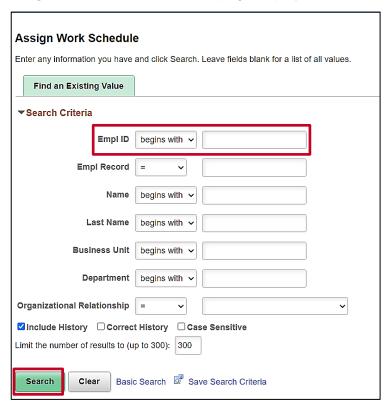
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Assigning an Employee's Work Schedule

 To enter an employee's Work Schedule, access the Assign Work Schedule page using the following path:

Navigator > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule

The Assign Work Schedule Search page displays.



Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the Empl ID field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

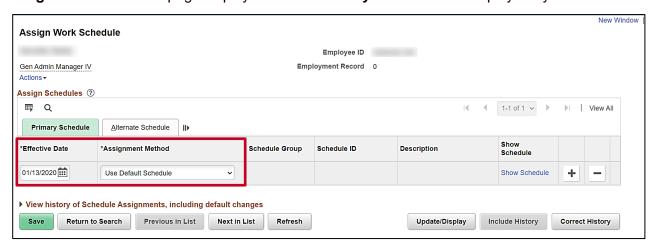
- 3. Click the **Search** button.
- 4. If multiple employees match the search criteria entered, the search results will display in the bottom portion of the page and you must click the **Empl ID** link for the applicable employee. If not, proceed to Step 5.

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The Assign Work Schedule page displays with the Primary Schedule tab displayed by default.

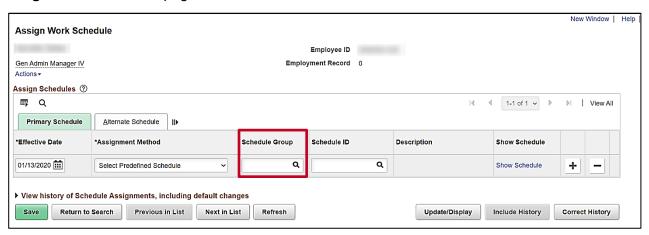


5. The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date Calendar** icon as needed.

Note: The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. The **Assignment Method** field defaults to "**Use Default Schedule**". Change this to "**Select Predefined Schedule**" using the dropdown button.

The Assign Work Schedule page refreshes.

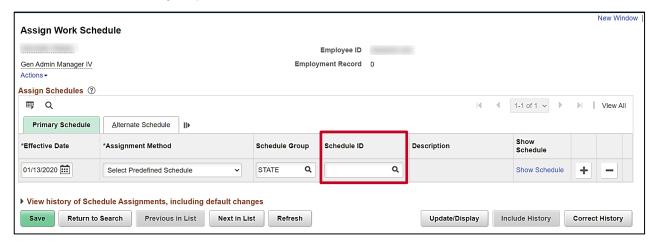


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- 7. Select the applicable Schedule Group using the **Schedule Group** field **Look Up** icon. The Schedule Group determines which schedule options (Schedule IDs) are available for selection. There are two types of Schedule Groups available which are listed below:
 - a. STATE Schedule Group the schedule options (Schedule IDs) available for selection are
 used across all state agencies. Select this option unless there is a schedule that is unique for
 your agency
 - b. All other Agency Specific (Business Unit) Schedule Groups the schedule options (Schedule IDs) available for selection include weekly schedules that are uniquely configured for the agency (business unit). The use of a Variable schedule (24 hours/7 days) is only found under the agency specific Schedule Groups



8. Select the applicable Schedule ID using the **Schedule ID** field **Look Up** icon. Select the schedule that is appropriate for the employee.

Note: Schedule IDs are smart coded, start with the applicable number of hours, and incorporate the on/off pattern of work days for a two-week pay period. See the **Work Schedule Naming Convention** section of this Job Aid for additional information.

The **Assign Work Schedule** page refreshes.

						New Window	Help	Personalize
Assign Work Sch	edule							
			Employee ID					
Gen Admin Manager IV Actions -		Empl	oyment Record 0					
Assign Schedules ③								
■ Q						1-1 of 1 🗸	$\Vdash \vdash \bot$	View All
Primary Schedule	Alternate Schedule ▶							
*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule		
01/13/2020	Select Predefined Schedule ~	STATE Q	40.00-Z88888Z-0 Q	5x8 hour days - 2 OFF together	SASU	Show Schedule	+	
▶ View history of School Save Return to	edule Assignments, including default cha			l	Jpdate/Display	nclude History	Correct	History

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- 9. The **Description** and **Rotation ID** fields default based on the Schedule ID selected. The Rotation ID denotes either:
 - a. The relative day(s) in the schedule pattern where the employee will be off. In this example, the Rotation ID of "SASU" indicates that the 2 days off together each week are Saturday and Sunday

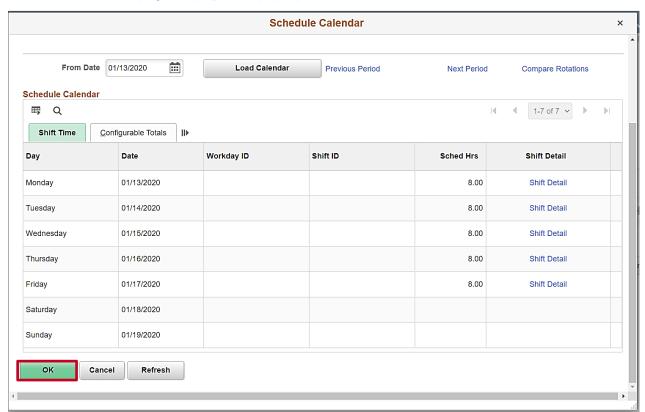
OR

b. When a schedule can vary from one week to the next week, you must select which of those weeks needs to be the start week. The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that schedule

Note: The Rotation IDs available for selection will vary based on the Schedule ID. See the **Schedule Examples** section of this Job Aid for additional information.

10. Click the **Show Schedule** link to view a visual representation of the schedule and confirm that the correct schedule was selected.

The **Schedule Calendar** page displays in a pop-up window.



11. Review the schedule information. Once confirmed as correct, click the **OK** button.

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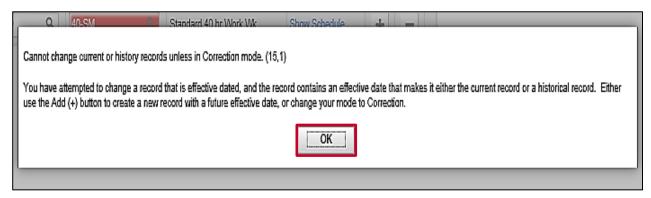
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The Assign Work Schedule page returns.

						New Window	Help	Personalize
Assign Work Sch	iedule							
			Employee ID					
Gen Admin Manager IV Actions -		Emplo	oyment Record 0					
Assign Schedules ③								
■ Q					4	1-1 of 1 🗸	$ \cdot $	View All
Primary Schedule	∆lternate Schedule }							
*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule		
01/13/2020	Select Predefined Schedule	STATE Q	40.00-Z888888Z-0 Q	5x8 hour days - 2 OFF together	SASU	Show Schedule	+	_
▶ View history of Sch Save Return to	nedule Assignments, including default cha o Search Previous in List Next in I			U	pdate/Display Incid	ude History	Correct	History

12. Click the Save button.

Note: If you are attempting to update a historical or current effective dated row, the below error message will display which indicates that you are entering the schedule change on the incorrect effective dated row. Check to be sure you are making the change on the new row, which displays at the top. If there is a historical change or correction that is required, you will need to open a Help Desk ticket to have the Cardinal Post Productive Support (PPS) complete the correction.



13. Click the **OK** button to close this message.

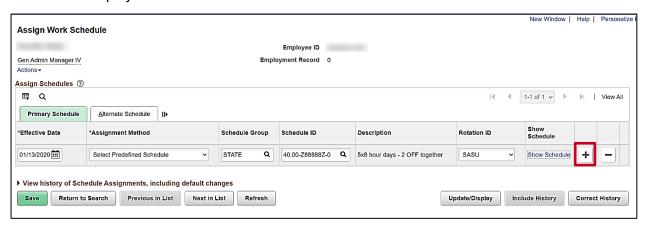
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Setting Up Multiple Schedule Changes

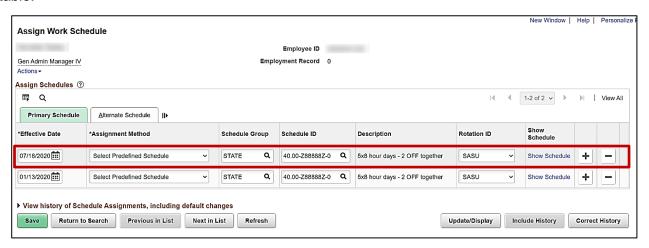
If you need to enter both a normal schedule and a temporary schedule change for an employee, Cardinal allows you to set up a future effective dated schedule change. The **Alternate Schedule** tab is not utilized in Cardinal.

1. Repeat steps 1-12 from the **Assigning an Employee's Work Schedule** section of this Job Aid to create the employee's normal schedule.



2. Click the Add a New Row icon (+).

The **Assign Work Schedule** page refreshes with an additional row. The new row displays at the top of the table.



3. The new row populates with the information from the current row. The **Effective Date** field defaults to the current system date. Update this date to the date that the change needs to take effect using the **Effective Date Calendar** icon.

Note: The effective date should be the actual date for the updates to take effect. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

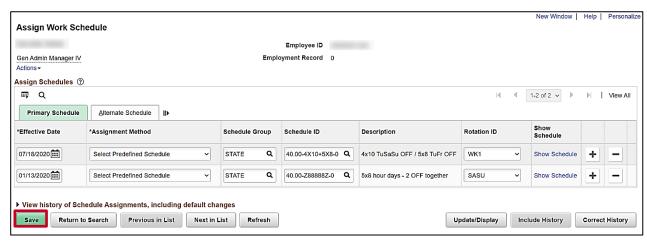
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Update the Schedule Group, Schedule ID, and Rotation ID fields as needed. Refer to the
 Assigning an Employee's Work Schedule section of this Job Aid as needed for specific data
 entry requirements and information.

The updated **Assign Work Schedule** page displays.



5. Click the **Save** button.

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Work Schedule Naming Convention

Below are some examples of how **Schedule ID**'s are named.

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAAB, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAA	7 day indicator –	0-9, A-X: for example
	first character is Day 1,	Z – Off Day
	second character is Day 2, etc.	0 – If the hours for the day are between 0.01 and 0.99
		1 – If the hours for the day are between 1.00 and 1.99
		A – If the hours for the day are between 10.00 and 10.99
		B – If the hours for the day are between 11.00 and 11.99
		X – If the hours for the day are 24.00
В	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAAB, Example: 9X80-Z9998ZZ-0

Character	Defines	Value
AAAAAA	7 day indicator –	0-9, A-X: for example
	first character is Day 1,	Z – Off Day
	second character is Day 2, etc.	0 – If the hours for the day are between 0.01 and 0.99
		1 – If the hours for the day are between 1.00 and 1.99
		A – If the hours for the day are between 10.00 and 10.99
		B – If the hours for the day are between 11.00 and 11.99
		X – If the hours for the day are 24.00
В	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

Note: 9X80 schedules must not be assigned to nonexempt employees.

Day 1 in the 14 day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees.

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SETID = <Business Unit>

Format: NN.NN-AAAAAAAB, Example: 40.00-5X8X3WK-0

Character	Defines	Value				
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5				
AAAAAA	7 day indicator –	Example:				
	first character is Day 1,	4X10+5X8 – Week 1 is a 4 day/10 hour work week,				
	second character is Day 2, etc.	and Week 2 is a 5 day/8 hour work week.				
		4X10X2WK - Week 1 is a 4 day/10 hour work week, and Week 2 is also a 4 day/10 hour work week, however the work days are not the same for each week.				
		4X10+OTH – Week 1 is a 4/day/10 hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10.				
В	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule				

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Sample Screenshots of Schedules and Schedule Calendar Pages

Below are some examples of schedules and shows the **Assign Work Schedule** page and the **Schedule Calendar** pages for that example.

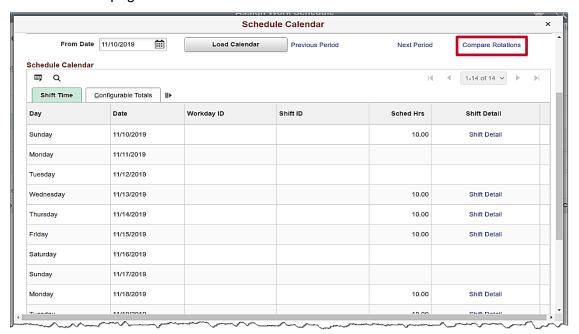
Sample – Rotating Schedule Assign Work Schedule page:

						New Window	Help	Personalize Pag
Assign Work Scho	edule							
			Employee ID					
Corr Ent Systems Analyst Actions ▼	<u>st</u>	Emplo	pyment Record 0					
Assign Schedules ③								
■ Q						1-1 of 1 🗸	\triangleright	View All
Primary Schedule	<u>A</u> iternate Schedule ▶							
*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule		
11/10/2019	Select Predefined Schedule ~	STATE Q	40.00-4X10X2WK-4 Q	4x10 - SuThFr / MoTuSa	WK2 V	Show Schedule	+	
▶ View history of Sche	edule Assignments, including default chan	nges						
Save Return to					Update/Display	Include History	Corre	ect History

Note: The correct Rotation ID needs to be selected based on the employee's first day in the weekly pattern and that is the effective date for the start of that schedule.

For this example, the employee's start date to work falls on the Monday of the second week. Use the **Show Schedule** link to verify the correct **Rotation ID** is selected.

Schedule Calendar page:



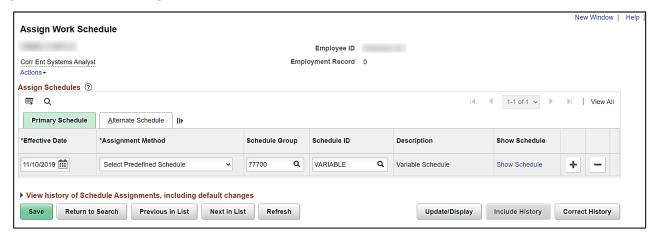
Note: Use the **Compare Rotations** link to identify the week that starts with employee's start date on a Monday as needed (in this example, it is week 2 which begins on Monday, November 18, 2019).

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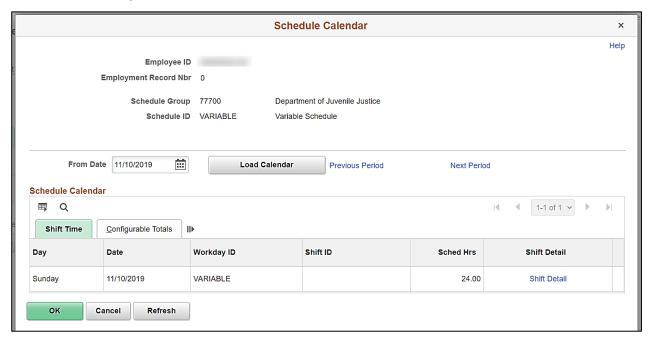


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Sample - Variable Schedule Assign Work Schedule page:



Schedule Calendar page:



Note: If an employee has a Variable Schedule, the **Sched Hrs** field displays "**24.00**". This schedule is used for positive time reporters whose schedule is so varied that they must report all hours.

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